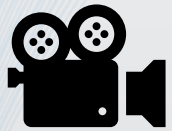# Streamlining FoundationIP®:
Revolutionizing IP Management with Black Hills IP

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Before We Get Started

Recording

A link to the recording and slides will be emailed to all registrants.

Recording

Type in the question box, and we will answer in real time or during the Q&A.

Social

Follow us on LinkedIn, Facebook, Youtube, and/or Instagram or visit blackhillsip.com to see upcoming and on-demand webinars.

Panel

Zhakalazky Carrion

Senior Manager – Docketing & Client Records, Schwegman Lundberg & Woessner

Thomas Marlow
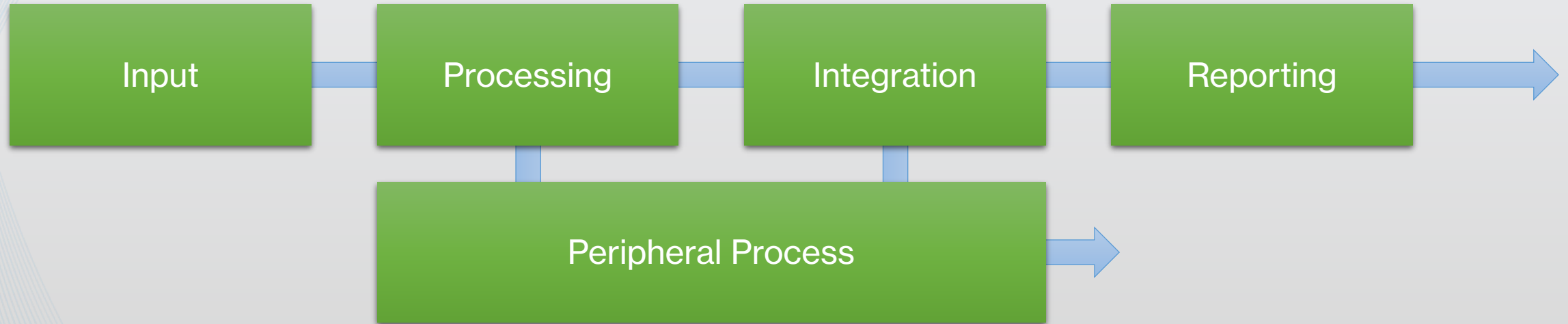
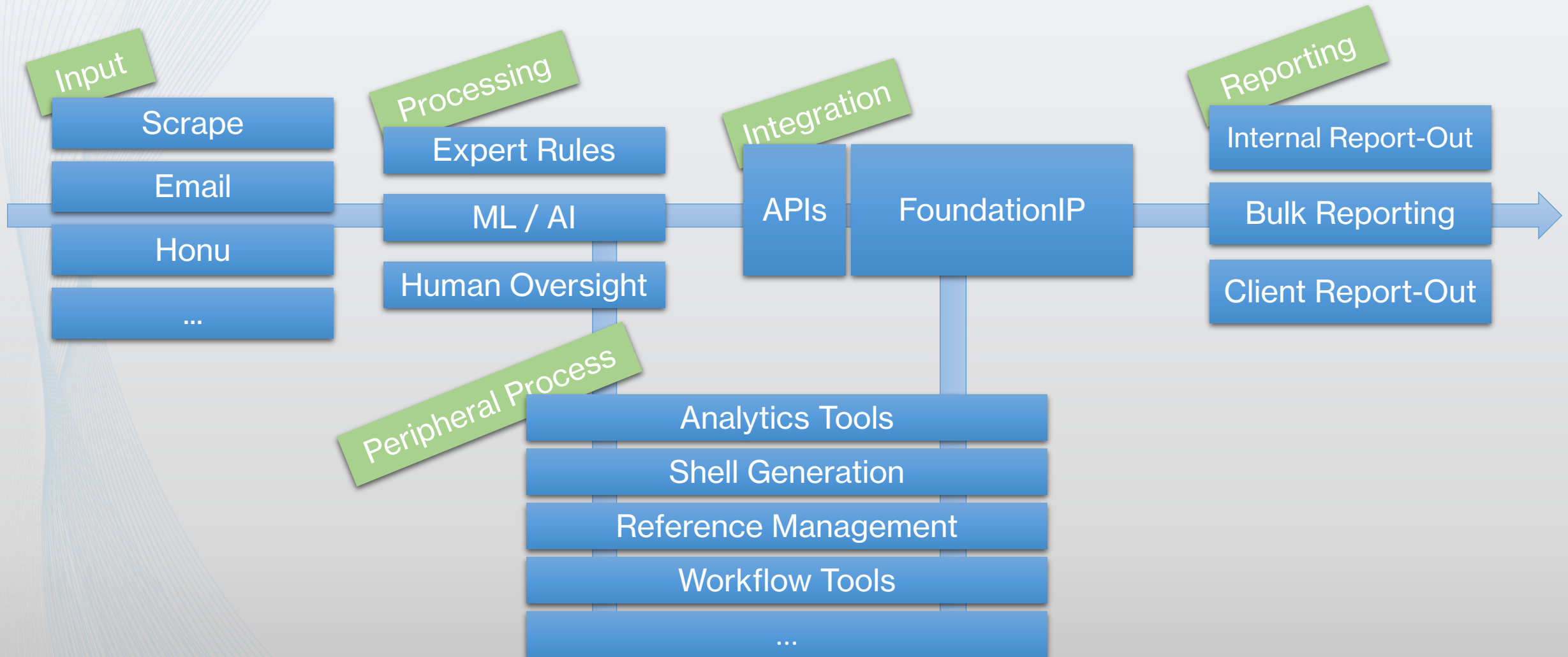*President, BHIP Renewals, CTO, Black Hills IP*

Adam Reece

IP Automation Specialist Lead, Black Hills IP
M.S. in Data Science student, University of St. Thomas

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IP Process & Automation

IP Process & Automation (detail)

Input
- Scrape
- Email
- Honu
- ...

Processing
- Expert Rules
- ML / AI
- Human Oversight

Integration
- APIs
- FoundationIP

Reporting
- Internal Report-Out
- Bulk Reporting
- Client Report-Out

Peripheral Process
- Analytics Tools
- Shell Generation
- Reference Management
- Workflow Tools
- ...

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Docketing in FIP

- FIP has extensive country law and template library
  - Swiss army knife
  - Steep learning curve
  - Country Law updates
- Take advantage of the docketing system
  - Enforce consistency
  - Reduce manual steps
  - Automate wherever possible

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Adding Automation

- BHIP maintains system-agnostic library of documents/docketing events

  - AI automatically identifies documents across all countries and case types

  - Breaks documents into actionable sub-categories

  - Standard mapping corresponding to one (or more) FIP templates

  - Customizable as needed

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Adding Automation (continued)

- End-to-end automation of docketing process

    - Receipt of docketing correspondence via

        - Scrape

        - Email

        - Honu

    - BHIP directly interfaces with FIP to perform docketing

    - Automatic verification of results

    - Optional: reporting emails internally and to clients

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Best Practices

- Create Template Codes according to Country Laws & your Procedures

- Automate Procedures/Reports

- Communication is Key

- Team-Work

- Written Checklists/Procedures

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Create Template Codes according to Country Laws & your Procedures
(Best Practices)

Generic
- When you are not repeatedly receiving the same PTO notification.
- Every PTO form does not need a customized template code.

Customize
- Eliminate extra work (exactly what you need, to avoid manual launch/modify).
- Time saver in the long run.
- Some activity attributes might drive reports or processes in place for other departments in your firm. Adjust to your procedures.
- Helps with automation.

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Automate Procedures/Reports
(Best Practices cont.)

- Not only for the docketing department but also other departments in your firm.

- Frees up time for other tasks that need your attention.

- Catch human errors (Filing Dates that can cause a Non-Recoverable to be docketed incorrectly).

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Communication is Key
(Best Practices cont.)

- Any changes/updates should be communicated to the team for the workflow to run smoothly.

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Team-Work
(Best Practices cont.)

- Makes the dream work!

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Written Checklists/Procedures
(Best Practices cont.)

- For training purposes

- Everyone to be on the same page

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SLW ACADEMY

https://slwacademy.com

- **Our Goal: To increase representation of diverse candidates in the field of intellectual property law**

- Free platform for students to explore & prepare for a career in IP Law

- Accessible and flexible education for high school, college, and law school students with a focus on hands-on IP training and practical skills

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Questions?

Thank you for your interest.

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